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Businesses find welcome

(Continued from Page S-2)

largely for a print campaign with the themes "The choice is Florida," "Hatched in Florida," "You name it we got it."

The ads run in national business magazines, high-technology trade magazines and real estate journals

"The decision to add another plant in Florida could take years," Charles Roedema, a Beber senior vp, says. "The point of advertising is to remind the executives that Florida should be an option when considering expansion plans."

Some of the business journals are regional buys, part of an in-state effort because state recruiters, who once concentrated their efforts on *Fortune* 500 companies, recently have turned their attention toward in-state expansions.

One company that has undergone continuous expansion is defense contractor Harris Corp., which moved its corporate headquarters from Cleveland to Melbourne near the Kennedy Space Center in 1978. The company since has built or purchased 24 buildings and hired at least 4,000 more employes for a total of 14,000.

Harris is one of an estimated 100 defense contractors in the state. According to state economists, in the past 10 years, Florida has moved from the nation's 14th largest defense contracting state to the eighth.

Defense contractors historically were the first large manufacturers to locate in Florida. Pratt & Whitney opened its government products divison in Palm Beach County in the 1950s.

Harris has had an electronics division near the space center since the late 1950s. Martin Marietta, Florida's largest defense contractor, started its Orlando division in 1957.

Top 10 cities

City	Population
1. Jacksonville	580,594
2. Miami	380,446
3. Tampa	276,444
4. St. Petersburg	243,002
5. Hialeah	157,680
6. Ft. Lauderdale	151,543
7. Orlando	143,320
8. Hollywood	124,025
9. Tallahassee	116,239
10. Miami Beach	96,913

Source: 1985 statistics, Florida Dept. of Commerce

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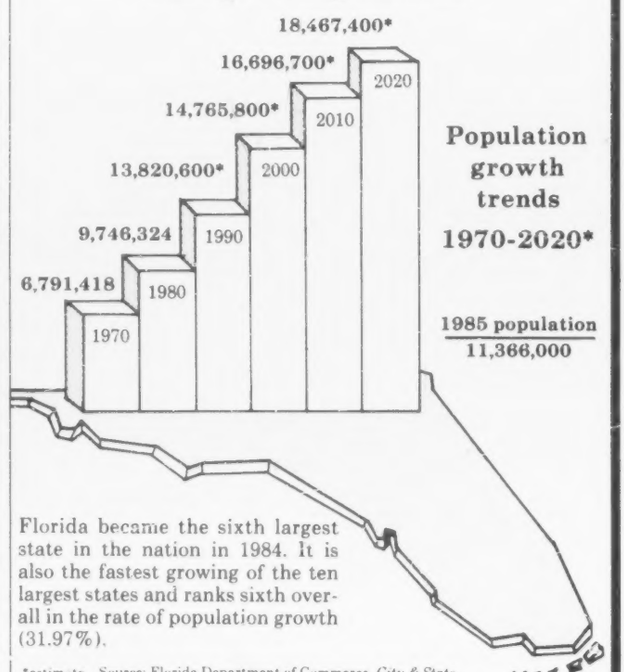

Florida became the sixth largest state in the nation in 1984. It is also the fastest growing of the ten largest states and ranks sixth overall in the rate of population growth (31.97%).

*estimate Source: Florida Department of Commerce, *City & State*

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Overseas dollars pour into Miami

By John F. Sugg

Miami is experiencing a somewhat different kind of tidal wave: Billions and billions of overseas dollars are flooding the city, transforming it into a global financial and commercial center. Over the last seven years Miami has gone from being the nation's 50th largest banking center to the fifth, trailing only New York, Chicago, Los Angeles and San Francisco.

John F. Sugg is vp and Miami manager for The Communications Group.

Illustrating the scope of this economy, Miami's Federal Reserve branch takes in $22 for each $1 distributed. The national average is $1 in, $1 out.

Professor Jan Luytjes of Florida International University fears that Miami's cash-hungry economy, with its chrome and pastel facade and murky substrata, will turn the city into a new Calcutta, black hole and all. Yet Mr. Luytjes sees the flow of international capital into Miami as being responsible for the city's commercial growth and necessary for continued expansion.

"The major problem is that for years we relied on only a few trading partners, primarily Venezuela," he says. "When economic conditions there worsened, we were hurt."

"We were too tied to one product—Latin America," agrees Dennis Nason, general manager of the Miami branch of Credit Suisse and current president of the International Center, Miami's forum for offshore trade and finance. "But we have been maturing, and now are strongly tied to Europe, the Far East and Africa, as well as the Caribbean and Latin America."

Miami, the gateway to the Caribbean and South America, also is in an excellent location for the world's economies to cross. The emerging infrastructure and expertise available in Miami also is winning nods from multinational enterprises.

As an example of Miami's far-flung endeavors, the large local personal products company Windmere Corp. recently sent its attorney, Cyrus Hornsby, to the People's Republic of China to form one of the first trading companies acceptable both to the laws of that Communist country and to U.S. corporate regulations. The project was so successful that companies from Japan and elsewhere now want to form joint ventures with Windmere's Chinese trading company.

"Miami's emergence as an international banking center is the result of many factors," says Bowman Brown, a banking specialist with the Miami law firm of Shutts & Bowen. "The area's geographic location and cultural

(Continued on Page S-12)

Florida expands

Florida's economic growth is reflected in its high 1984 ranking of new plant start-ups and business expansions.

New plants

1.	Texas	186
2.	**Florida**	**149**
3.	California	114
4.	North Carolina	84
5.	Pennsylvania	81
6.	New York	70
7.	Georgia	60
	Indiana	60
9.	Maryland	58
10.	Illinois	56

New business expansions

1.	California	298
2.	Alabama	122
3.	Kentucky	101
4.	New York	86
5.	**Florida**	**74**
6.	Kansas	73
7.	Texas	68
8.	Tennessee	67
9.	Arkansas	59
	Missouri	59

Source: 1984 statistics, Florida Department of Commerce

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Overseas dollars pour in

(Continued from Page S-10)

and economic ties make it almost as much a part of Latin America as of the United States. Miami's population is approximately 58% Latin in origin. Spanish is widely spoken and the city has a Latin character."

According to Tony Villamil, senior vp and economist for Southeast Bank N.A., Miami's proximity to Latin America and the comfortable bilingual environment provide an irresistible lure for the affluent in the Caribbean and South America. More than 1.5 million Latins visit Miami each year, and with them comes money—lots of it.

This money spurred a boom in international trade, transforming a sleepy tourist town into a major import-export center. More than $5 billion in goods flows annually through the Port of Miami.

To facilitate the trade, international banks began eyeing the city. In the city today there are more than 90 foreign bank agencies and Edge Act banks, which are subsidiaries of U.S. banks licensed to engage in foreign trade.

Miami's international banks surpass New York both in number and in volume of assets, according to the Greater Miami Chamber of Commerce. Total offshore deposits are estimated at $10 billion to $15 billion. "Those deposits are increasing at a rate of 50% a year," Credit Suisse's Mr. Nason says.

James Whisenand, an attorney for many of the foreign banks, says this growth "is especially significant when you realize that six years ago, we had no foreign agency or Edge Act banks here."

This money's impact on Miami is fairly substantial. According to a recently completed study by Robert Grosse of the University of Miami's International Banking Institute, the international sector accounts for about $800 million to $900 million of Miami's $20 billion annual payroll. That is a much higher ratio than most other U.S. cities.

Miami's banks, foreign and domestic, have a distinctly multinational flavor. Recently, for example, the Private Bank & Trust Co., which provides European-style services, opened its doors on Brickell Ave., Miami's fashionable version of Wall St.

"They may only have 30 clients the first year," Mr. Whisenand says, "but they will be very substantial clients."

Many of the banks now have offshore owners. For example, Miami National Bank now is controlled by a Spanish group headed by Francisco de Borbon, the Duke of Seville, currently a Miami Beach resident. Other banks are owned by Brazilians, Ecuadoreans, Portuguese.

All this international capital in Miami has spurred the growth and sophistication of many support services, but some bankers and executives believe Miami doesn't market itself well.

National law firms vigorously compete for the offshore clients. The Big 8 accounting firms tailor their services to a multinational clientele. Commercial office areas vie for tenants with boasts of international amenities. One Miami suburb, Coral Gables, is the haven for more than 100 multinational corporate headquarters.

Despite the burgeoning growth of such service indus-

'Smurfs' cleaning up in international economy

Now for the seamy side of Miami's multi-billion-dollar international economy.

Bundles of offshore dollars flowing into Miami are tainted by drugs, gunrunning and other exotic activities. That's where the Miami "smurf" comes in. And in Miami, these smurfs definitely are not for kids, and the more appropriate color for them is green, not blue.

A smurf, in Miami's "Spanglish" lingo, is someone who travels from bank to bank converting $9,900 in hundred-dollar bills into money orders.

Why $9,900? Because a $10,000 cash transaction must be reported to federal banking authorities.

So anyone—drug smuggler, corrupt South American politician sandbagging money away in the U.S., clandestine arms dealer—with a lot of hundred-dollar bills uses "smurfs" to transform those bills into money orders that can be privately deposited into a bank account.

—*John F. Sugg*

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While the international banking business has been booming in Miami, some have criticized the city's marketing of its operations.

young city, and we still don't have our act completely together," Mr. Nason says. "We are still building the infrastructure [to support international trade], and we still are in transition from what we were to what we will be."

The infrastructure is taking shape, however. Mr. Nason says that within recent weeks, Miami took the first steps to the creation of a World Trade Center.

"In international banking, I think we are maturing and there is a general shift to private and investment banking along European lines," Mr. Whisenand says. "This should draw even more foreign capital to Miami and will even more firmly establish Miami as a world financial and trade center." AA

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tries, the city is lamentably lax in selling its international skills. "We have not marketed ourselves well," Mr. Nason say. "I guess you could say that banking is not a very sexy subject to market, but that's no excuse for us not being more aggressive."

Although many Miami advertising agencies have handled prestige tourism accounts, few have won kudos for marketing international financial services.

Miami "agencies really don't have much skill in dealing with foreign markets," says Sandy Tinsley, chairman of Tinsley Advertising, one agency that has promoted the city's trade and finance through work for the Port of Miami, the City of Coral Gables and the Dade County (greater Miami) Economic Development Coalition.

Looking to the future, Miami has more problems than just marketing itself to the world. It has crime—on the wane, perhaps, but still real. And Miami's international elite, new to the field, still are uncomfortably trying to adjust to a changing world economy.

Much-publicized drug smuggling accounts for an estimated $8 billion annual local cottage industry. Also, massive amounts of cash flow into a variety of unlikely and often unsavory enterprises.

Major league multinational financial scams also are a part of the Miami milieu. Mr. Whisenand's law firm represents the Venezuelan government, which is trying to recover $800 million allegedly misappropriated by a fugitive financier, Florida's largest banking group and a once-powerful Miami law firm.

Money laundering has been hit hard by regulators, but still surfaces. Miami's Sunshine State Bank was closed last month; investigators suggested that it was the first bank that may have been purchased for the primary purpose of laundering funds.

Of greater concern to the bankers and merchants is how to turn Miami's boisterous international infant into a mature and stable adult global community.

"Our future continues to rely on a vibrant Latin American economy," Mr. Villamil says, noting that Miami has trailed the rest of Florida in economic recovery because the debt-plagued Latin economies have been anything but vibrant. "We're a

More about Florida's Money Market

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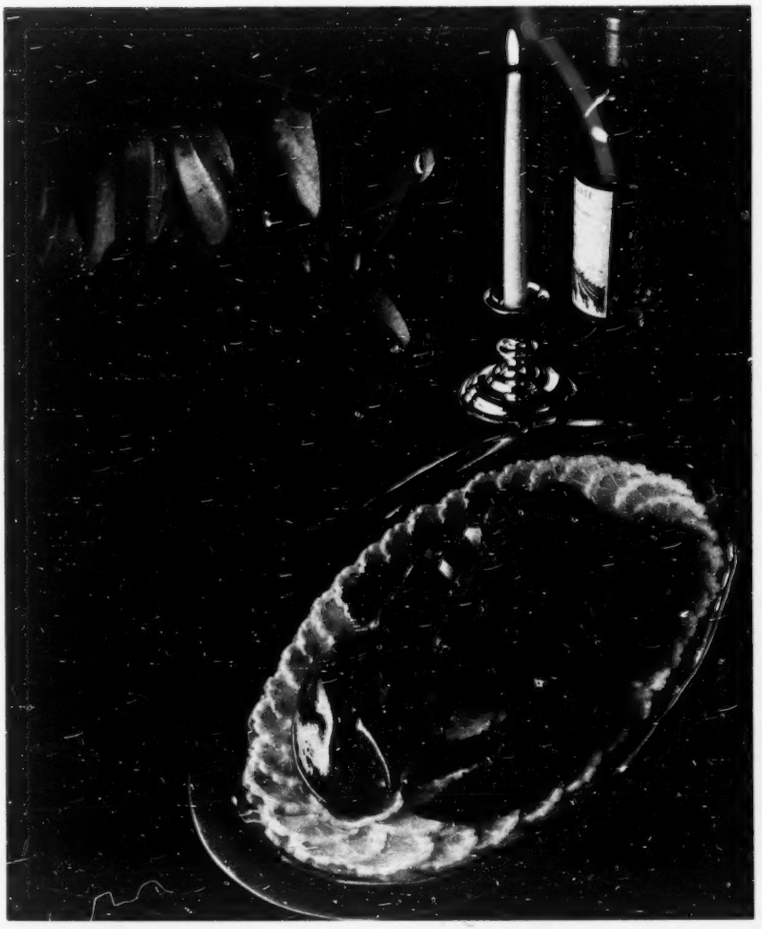

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Tourism trade shifts strategy to lure travelers

By Maureen Glabman

Henry Flagler didn't have the title, but he was Florida's most important early tourism official.

Mr. Flagler came to the state before the turn of the century, built a railroad along its east coast, erected at least five hotels near its tracks and then advertised Florida as a resort in northern newspapers. He created the first important device to make Florida a tourist state—accessibility between the North and South.

Things have only gotten better since Mr. Flagler came south, because tourism has grown to become Florida's largest industry. In the past, the weather was used to lure tourists, but a new strategy uses activities in the state as the bait.

State tourism today is a $22 billion industry, according to Rene Welti, assistant director, Florida Division of Tourism. An estimated 30 million out-of-state visitors arrived in 1985, a 7% increase from 1984.

Some of the reasons for the boom are apparent. College students migrate south to Florida for spring break and families fondly view the state as the domain of Disney World.

Helping to round out potential visitors' visions of the state is Florida's Division of Tourism and Economic Development, which presides over a $9.3 million statewide budget. Additional individual county and city agencies have tourist-luring war chests that total $36 million.

A bill that would have more than doubled the division's budget to about $20 million with a tax levied on accommodations, taverns, attractions and rental cars was defeated before the state legislature adjourned June 6.

However, the state gave the division an additional $500,000 for its 1986-87 budget. The state's tourism picture still could change radically if voters approve a casino gambling referendum in November.

During the 1960s and 1970s, tourism helped keep Florida's economy on even footing when it traveled a rocky road because of real estate investment speculation and double-digit inflation. Although tourism has had a steadying influence on the state's economy, over the years it has developed its own sensitivities, hinging on the dollar's strength overseas and the price of gas, to name just two.

Florida gets a lion's share of Latin American business. But Latin currencies are volatile, and the state cannot bank on a steady deposit of Latin tourist dollars. In response, tourism officials search for business within the U.S. and from Europe.

Strategy is a word heard a lot in state tourism circles. Florida's tactic once was to attract winter-weary tourists through a six-year campaign created by Mike Sloan Advertising, Miami, and tag lined "When you've got it bad, we've got it good."

Although officials called that strategy successful, the planning has changed. For the first time in the state's history, tourism ads do not focus on weather but on the diversity of available activities.

The first ad campaign created by Miami-based Beber, Silverstein & Partners, which took over the state account last year, stressed diversity in big winter and spring pushes in 36 U.S. print and tv markets.

More than 80% of the campaign, which carried the theme, "We got it. Florida," was delivered through broadcasting.

Several tv spots opened with views of grassy areas, cowboys and horses—scenes not usually associated with Florida. They were followed with attraction and beach scenes. "What we were saying is that there is so much to see and do in Florida," Beber partner Sid Levin says.

The state also has begun its first major in-state summer print campaign, which is running in 25 Florida newspapers this month.

The theme, "Play in your own back yard," headlines a four-page, four-color ad of 32 Florida flings and a calendar of summer events. Some 44 radio stations were given accompanying public

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service announcements.

Summer tv spots convey another theme: Family fun. Tourism division-financed studies showed Florida was losing family business because families typically travel to cooler climes during the summer. To counter this, the agency created tv spots that show a grandfather and son fishing, a mother and daughter at the beach and a little girl smiling. The voiceover says: "The best thing about your Florida vacation is the smile on your child's face."

"All along we've been going after the sun idea, promoting winter business," Mr. Welti says. "Now we're promoting Florida as a year-round travel destination."

State officials hope the calen-

(Continued on Page S-16)

Counties take initiative on inviting visitors

The lure of Florida's sun, sand and surf notwithstanding, the state's counties and cities are leaving nothing to chance. They are backing up Florida's tourism budget of $9.3 million with another $36 million in individual efforts. The aggressive tourism drives are financed in part by a 2% state tax on accommodations.

Some counties and cities, notably the Miami-Fort Lauderdale and Orlando areas, are big winners in attracting tourist dollars. The other cities and regions are competing to increase their take in the tourist trade.

Much of the tourist action is centered in the Orlando area where popular attractions such as Sea World and Disney's Epcot Center and Magic Kingdom are located. More than 10 million visitors passed through Orlando last year, says Bill Peeper, executive director, Orlando/Orange Convention and Visitors Bureau. Orlando will have 60,000 hotel rooms at the end of 1987, up from 40,000 in 1984.

Although Disney has an estimated $17 million promotions budget, the bureau has a mere $500,000, most of which goes toward salaries, Mr. Peeper says. The low budget is the result of the county's bed tax revenue having been used to build a new convention center. The bed tax goes to 3% next year, and the budget will increase to $1.7 million.

Orlando will have 60,000 hotel rooms at the end of 1987, up from 40,000 in 1984.

Broward County's Tourist Development Council has a $5.5 million budget, $2.5 million of which advertises a diversity theme. Created by BDA/BBDO, Atlanta, and placed in northern markets, Broward's four-color "Imagine That" ads stress its restaurants, sports, water activities, hotels and cultural events. Of the 3 million Broward visitors last year, several hundred thousand flocked to Fort Lauderdale and Pompano Beach during collegiate spring breaks.

Palm Beach County, which has a $3.4 million budget, is spending $1 million on a spring-

(Continued on Page S-17)

Florida's quality of life

Miles of coastline, state park acreage and warm weather are "quality of life" measures. Florida ranks in the top 10 in all three.

Miles of coastline

1. Alaska	6,640
2. Florida	**1,350**
3. California	840
4. Hawaii	750
5. Louisiana	397
6. Texas	367
7. North Carolina	301
8. Oregon	296
9. Maine	228
10. Massachusetts	192

Total acreage of state parks

1. Alaska	3,029,949
2. California	1,116,301
3. New Jersey	290,353
4. Pennsylvania	278,909
5. Illinois	273,358
6. Massachusetts	261,354
7. New York	255,911
8. Florida	**252,696**
9. Michigan	247,737
10. Washington	220,000

Mean number of days minimum temperature of 32 degrees or less

1. Hawaii	0
2. Florida	**8**
3. Louisiana	27
4. California	32
5. Texas	40
6. Alabama	50
7. Mississippi	54
8. Georgia	55
9. South Carolina	56
10. North Carolina	70

Source: 1984 statistics, Florida Department of Commerce

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The Garden Of Eden, circa 1980, by Erasure S. Field

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3	CHICAGO	147.8	8	MINNEAPOLIS	111.5
4	BOSTON	142.1	9	SAN FRANCISCO	104.7
5	DALLAS	133.2	10	COLUMBUS	92.6

Call 305/644-3355 for media kit or write Box 2207, Orlando, FL 32802.

*National Planning Assn. forecast

Tourism shifts strategy

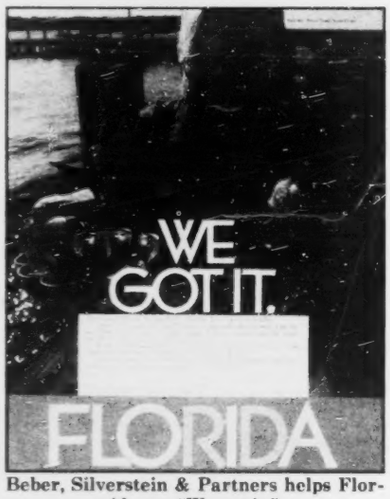
(Continued from Page S-15)

dar of events will draw some tourists who might want to avoid the crowd at New York's Statue of Liberty unveiling. "We're listing 25 July Fourth events," Mr. Welti says. "That's our counter to July Fourth in New York."

Although this will be a good year for New York tourism, says Vivian Deuschl, spokeswoman for the U.S. Travel and Tourism Administration in Washington, prospective Florida and New York tourists are not in the same economic bracket. "Families will head to Florida this summer because a hotel room that might have been unaffordable in winter is reasonable in summer," she says.

It is too soon to tell if Florida's summer campaign will be a success, Ms. Deuschl says. "You can't overestimate the fact that people think Florida is hot in summer. And in summer, people don't want to go someplace that is hotter than where they are. They want to get away from it—to Alaska for example."

In addition to advertising, the tourist division takes part in trade shows, serves free orange juice at six of seven welcome centers, educates the state's hotel and restaurant personnel on the value of service, finances research and staffs foreign offices in London, Toronto and Frankfurt.



Beber, Silverstein & Partners helps Florida say "We got it."

Florida competes with Sunbelt states, including California and Texas, during the winter, and Colorado, Canada and northern states in summer, Mr. Welti says. Despite the fact Florida does not spend as much as other states—Illinois spends $15.5 million and Michigan allocates $11.8 million to Florida's $9.3 million—the southern state is better known as a tourist destination.

"Florida has the strongest tourism image of any state because they've been promoting it longer," Ms. Deuschl says. "For years, states like Illinois didn't have big tourism budgets. Florida has a big advantage in that people know it as a resort, where a state like Illinois has to work harder."

Until two years ago, she says, California had nearly the lowest state tourism budget. "Now California spends over $6 million. They saw they were losing their share of the market.

"States have looked at tourism as a new source of revenue in view of declining industries," she says. "They are starting to realize that every dollar spent on tourism rolls over 18 times in other areas." U.S. tourism officials say all states combined will spend $216 million on tourism in 1985-86, up 13% from 1984-85.

Mr. Welti says Florida tourism should grow another 7% this year. Some of the factors mirror Mr. Flagler's railroad, continuing improvements in transportation. Others are beyond any tourism director's control.

"It sounds like it's going to be a banner year because there is strong consumer confidence in travel, discretionary income, and fuel and air prices are competitive," he says. "There's also a trend to travel in America because of the weak dollar and terrorism abroad. Consumers are looking at safety as part of travel, and Florida is perceived as a safe destination." AA

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Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

June

	Current month 1986	1985	Year-to-date 1986	1985
— Art & antiques —				
American Artist	—	—	—	—
Antiques	—	—	—	—
Art in America	—	—	—	—
Southwest Art	62.0	62.0	427.4	467.5
Total Group	**62.0**	**62.0**	**427.4**	**467.5**
% change		**-0.0%**		**-8.5%**
— Auto/cycle/rec. vehicles —				
Auto Week (52X)	202.3	139.1	899.6	798.3
Car & Driver	93.6	115.5	582.1	635.3
Car Collectors & Car Classics	17.5	20.3	89.7	114.7
Car Craft	82.1	80.7	440.7	436.3
Circle Track	60.6	55.2	372.2	321.6
Cycle	55.2	57.4	325.7	337.8
Cycle Guide (11X)	52.9	55.1	309.3	279.0
Cycle World	60.9	65.3	353.5	389.7
Dirt Rider	47.1	38.5	273.8	210.7
Dune Buggies & Hot VW's	86.1	105.5	520.5	535.7
Family Motor Coaching	139.0	134.9	898.1	893.4
4 Wheel & Off-Road	92.1	84.2	519.2	442.0
Four Wheeler	86.4	96.2	505.6	519.7
Hot Rod	72.6	73.2	384.3	384.7
Motorcyclist	63.0	48.0	334.3	253.5
Motor Trend	77.5	98.8	413.8	468.1
Motorhome Life	107.2	109.8	576.7	589.3
Pick-Ups & Minitrucks	—	—	—	—
Rider	68.2	69.3	348.6	375.9
Road & Track	126.2	133.7	613.2	693.8
3 Wheeling	60.7	62.4	355.2	324.4
Trailer Life	137.0	148.8	726.6	801.8
Total Group	**1,788.2**	**1,791.9**	**9,842.7**	**9,805.7**
% change		**-0.2%**		**+0.37%**
— Boating & yachting —				
Boating	119.7	127.7	912.8	901.1
Chesapeake Bay	41.5	31.1	223.7	188.7
Cruising World	107.0	117.4	753.8	784.6
Lakeland Boating (10X)	69.8	58.0	431.0	412.5
Motor Boating & Sailing	148.8	140.8	1,154.6	1,087.6
Sail	99.5	130.1	707.1	859.1
Small Boat Journal (6X)	53.7	49.9	166.8	153.4
Sport Fishing (6X)	—	—	—	—
Trailer Boats (11X)	43.3	32.1	296.5	235.4
Western Boatman (6X)	—	—	132.8	148.8
Yachting	121.4	153.3	887.2	1,066.8
Total Group	**804.7**	**840.4**	**5,666.3**	**5,838.0**
% change		**-4.2%**		**-2.9%**
— Canadian —				
L'Actualite	86.7	73.7	520.3	371.8
Chatelaine				
English Edition A	92.1	83.7	579.6	553.2
French Edition	81.0	70.3	505.3	452.9
City and Country Home (8X)	57.3	49.3	269.9	200.5
City Woman	—	—	—	—
Equinox (6X)	—	—	—	—
Financial Post Moneywise A	36.4	37.6	228.8	202.6
Figure A	60.4	64.2	443.0	387.7
Maclean's (52X) A	143.5	106.3	816.2	703.1
Montreal Magazine (10X)	—	—	—	—
Montreal Ce Mois Ci	—	—	—	—
Reader's Digest				
Canadian-English A	91.5	89.7	435.4	391.2
Canadian-French A	90.3	65.5	358.1	299.8
Toronto Life	98.1	99.2	548.1	492.8
Vancouver	—	—	—	—
Total Group	**837.3**	**739.5**	**4,704.7**	**4,055.6**
% change		**+13.2%**		**+16.0%**
— Civic/fraternal —				
American Legion	19.3	16.4	145.7	161.6
Elks (10X)	15.4	15.9	112.1	119.5
Kiwanis	15.6	23.5	107.5	98.4
Lion (10X)	5.3	6.0	30.0	30.7
Rotarian	10.1	10.9	88.8	71.9
V.F.W. (11X)	26.4	28.9	163.9	159.3
Total Group	**92.1**	**101.6**	**648.0**	**641.4**
% change		**-9.3%**		**+1.0%**
— Comics —				
DC Comics	3.5	7.0	33.5	34.5
Marvel Comics Group	8.0	7.0	40.0	36.5
Total Group	**11.5**	**14.0**	**73.5**	**71.0**
% change		**-17.8%**		**+3.5%**
— General —				
American Health (10X)	—	—	—	—
American West (6X)	—	—	—	—
The Atlantic A	24.6	41.2	232.9	289.7
Audubon Magazine (6X)	—	—	—	—
Bon Appetit A	78.7	96.7	496.9	510.1
Changing Times	42.4	43.2	292.6	237.5
Connoisseur	78.7	75.6	432.5	377.2
Consumer's Digest (8X)	14.0	16.3	89.0	99.8
Ebony	95.0	96.1	578.1	551.5
Fifty Plus	32.5	31.0	244.8	188.8
Food & Wine	40.5	51.7	274.4	254.6
Games	14.1	14.8	106.7	95.5
Gourmet	94.9	101.4	550.4	558.7
Home Entertainment (8X)	29.0	28.3	124.6	129.3
Harper's A	19.2	27.7	142.4	159.9
Let's Live	50.0	40.0	288.0	265.0
Life	51.0	68.1	333.4	397.2
Modern Maturity (6X)	43.8	43.2	129.4	142.2
Money	—	—	—	—
Moneysworth (4X)	10.0	12.4	37.2	30.5
Mother Earth News (6X)	—	—	—	—
Mother Jones (9X)	15.8	16.4	78.8	78.9
National Geographic	—	—	—	—
Natural History	26.8	39.4	247.7	262.7
Prevention	57.7	52.5	375.4	357.0
Psychology Today	24.9	21.6	158.2	151.2
Reader's Digest A	—	—	—	—
Saturday Evening Post (9X)	40.6	41.8	150.7	141.1
Signature	74.4	56.6	427.9	341.9
Smithsonian	63.1	91.6	470.3	551.6
Success	—	—	—	—
Sylvia Porter's Personal Finance (10X)	34.8	38.8	203.0	118.3
Town & Country	99.7	105.7	706.6	752.7
Travel-Holiday	33.1	41.7	270.7	304.9
Travel & Leisure	128.2	106.3	640.1	666.1
Vanity Fair	38.7	44.6	253.4	198.8
Writer's Digest	33.4	23.2	155.4	143.5
Yankee	66.2	67.1	428.8	412.1
Total Group	**1,455.8**	**1,535.0**	**8,920.3**	**8,768.3**
% change		**-5.1%**		**+1.7%**
— Home —				
Americana (6X)	25.4	23.1	94.2	110.8
Architectural Digest A	172.6	190.1	771.2	812.3
Better Homes & Gardens	121.9	130.5	687.4	698.0
Colonial Homes (6X)	72.5	79.5	188.8	187.7
Columbus Monthly-Homes (4X)	—	—	52.3	—
Country Home (6X)	49.0	29.5	141.1	96.7
Country Journal	20.0	32.9	148.8	193.2
Country Living	65.9	66.7	429.2	396.4
Dallas-Ft. Worth Home & Garden	66.9	88.5	478.8	402.5
Family Handyman (10X) A	—	—	331.7	323.4
Flower & Garden (6X)	29.2	33.0	130.0	125.6
Harrowsmith (6X)	33.1	—	128.6	—
Home	55.5	50.7	306.7	305.5
Home Mechanix	—	—	—	—
The Homeowner (10X)	21.6	22.1	162.7	143.2
Horticulture	—	—	—	—
House Beautiful	78.0	121.6	464.9	505.0
House & Garden	87.0	96.1	574.9	591.8
Houston Home & Garden	73.5	95.7	459.8	516.7
Metropolitan Home	56.1	71.9	366.3	399.2
New Shelter (9X)	—	—	262.7	270.5
1,001 Home Ideas	49.5	39.1	271.6	275.8
Rodale's Organic Gardening	50.4	46.4	394.8	370.6
Phoenix Home/Garden	55.7	57.2	407.0	397.1
Rx Being Well	28.0	23.0	77.0	75.0
San Diego Home/Garden	69.4	88.8	416.8	434.8
South Florida Home/Garden	—	—	—	—
Southern Accents (6X)	—	—	—	—
Southern Living	155.1	127.2	893.1	792.5
Sunset Magazine A	147.3	156.2	876.1	894.0
Texas Homes	64.0	59.1	394.6	482.4
Workbench (6X)	—	—	159.8	171.7
Total Group	**1,647.6**	**1,728.9**	**10,071.2**	**9,972.4**
% change		**-4.7%**		**+0.99%**
— In-flight & other passenger —				
Alaska Airlines	71.2	55.9	339.4	279.9
American Way (25X)	—	—	—	—
East/West Network				
Eastern Review	71.7	84.5	564.5	589.7
Frontier	32.7	27.0	181.0	129.1
Northwest Orient	43.8	45.0	272.6	229.8
Ozark	35.8	45.2	269.1	228.9
PSA Magazine	103.2	80.7	547.7	453.5
Pan Am Clipper	54.3	63.0	285.4	348.3
Republic Scene	43.2	46.5	301.8	267.2
Spirit	118.8	113.5	579.9	518.4
United	102.0	92.8	557.1	530.0
Western's World	58.7	49.0	370.9	316.7
Halsey Publications				
Air Cal	60.5	55.0	316.3	274.9
Delta Sky	83.0	69.3	462.3	432.1
People's Expressions	32.0	—	187.3	—
US Air	48.0	30.9	265.7	272.5
Hawaii (6X)	25.6	23.8	170.4	135.6
Pace	105.1	93.7	544.1	389.6
Presidential Airways (6X)	9.2	—	29.2	—
Southwest Airlines	—	—	—	—
Spirit of Aloha (6X)	25.4	23.7	168.6	146.2
TWA Ambassador	59.7	61.1	301.4	301.3
Total Group	**1,183.9**	**1,060.6**	**6,685.5**	**5,843.7**
% change		**+11.6%**		**+14.4%**
— Men's —				
Esquire A	197.5	172.5	621.3	641.5
Firehouse Magazine (13X)	71.3	73.6	270.5	273.6
Gentlemen's Quarterly A	130.1	138.0	859.0	825.2
M	45.3	41.3	320.3	303.0
Penthouse A	—	—	—	—
Playboy A	73.5	83.0	386.9	431.8
Total Group	**552.6**	**552.7**	**2,674.3**	**2,712.9**
% change		**-0.0%**		**-1.4%**
— Metropolitan —				
Aloha (6X)	—	—	—	—
Atlanta	59.7	50.2	324.3	316.9
Baltimore	61.5	100.2	432.1	467.5
Boston	149.7	134.2	879.5	868.0
California	73.3	95.0	445.2	422.0
Charlotte (10X)	—	—	—	—
Chicago	131.4	181.0	730.8	792.1
Chicago's North Shore	90.2	74.5	465.1	455.7
Cincinnati	47.0	54.6	352.2	322.5
Cleveland	74.5	74.0	429.6	441.4
Coast (38X)	310.6	424.1	1,101.2	1,189.6
Columbus Monthly	60.4	77.2	382.9	399.7
Connecticut	103.5	100.4	562.0	535.7
D/Magazine, Dallas/Ft Worth	114.6	123.3	749.9	772.1
Denver	38.0	34.7	212.6	176.1
Detroit Monthly	86.2	71.7	491.4	349.2
Grand Rapids	28.7	33.7	240.5	285.9
Gulfshore Life (10X)	77.0	61.1	523.7	380.0
Honolulu	52.5	56.6	343.2	346.4
Houston City	51.0	82.7	322.3	447.7
Indianapolis	—	—	—	—
Kansas City	—	—	—	—
Los Angeles	143.6	166.3	899.4	1,011.6
Louisiana Life (6X)	—	—	119.0	166.0
Madison	81.0	63.0	394.0	362.0
Metropolitan Detroit	77.3	78.1	446.2	439.2
Miami Mensual	—	—	—	—
Mid-Atlantic Country	55.0	50.2	240.4	284.6
Milwaukee	57.6	47.5	394.9	367.8
Minneapolis/St. Paul	85.9	102.6	557.4	580.2
Nashville	24.0	40.0	209.0	211.0
New England Monthly	33.9	30.9	220.3	177.5
New Jersey Monthly	82.4	65.5	466.9	353.9
New Mexico	—	—	—	—
Ohio	67.6	76.0	358.8	390.3
Orlando	90.5	94.0	594.7	599.9
Palm Beach Life	24.5	27.1	421.1	510.5
Palm Springs Life	50.6	56.3	678.6	702.3
Philadelphia	120.4	122.9	745.2	785.4
Phoenix	74.2	67.3	563.5	582.1
Pittsburgh	104.2	102.2	395.5	377.8
St. Louis	40.0	54.0	269.3	339.5
San Diego	130.0	150.2	823.2	941.4
San Francisco (6X)	—	—	—	—
San Francisco Focus	—	—	—	—
Texas Monthly	127.4	143.2	780.5	702.6
Twin Cities	71.9	81.7	308.9	347.1
Ultra	61.8	70.2	361.5	436.7
The Virginian	—	—	175.0	173.0
Washington (7X)	90.5	44.0	228.0	97.0
Washington Dossier (11X)	53.1	90.0	305.2	345.6
The Washingtonian	135.0	139.8	870.0	899.8
Total Group	**3,492.2**	**3,792.2**	**20,815.0**	**21,153.0**
% change		**-7.9%**		**-1.5%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	21.6	18.6	124.0	110.3
Secrets	21.6	18.6	124.0	110.3
True Confessions	21.6	18.6	124.0	110.3
True Experience	21.6	18.6	124.0	110.3
True Love	21.6	18.6	124.0	110.3
True Romance	21.6	18.6	124.0	110.3
Sterling Women's Group				
Daytime TV	26.5	28.5	151.5	173.0
Modern Screen	16.5	12.3	47.5	41.8
Movie Mirror (6X)	1.0	24.5	17.5	70.5
Soap Opera Stars	16.3	20.5	49.6	59.5
TV Movie Screen (6X)	9.3	6.3	25.9	19.3
TV Picture Life (6X)	1.0	2.0	10.6	15.0
Total Group	**200.2**	**205.7**	**1,046.6**	**1,040.9**
% change		**-2.8%**		**+0.54%**
— Music/entertainment —				
American Film (10X)	—	—	—	—
Audio	97.5	108.8	443.2	495.5
Circus Magazine	—	—	—	—
Dance Magazine	44.1	42.3	346.4	355.3
Musician	49.5	56.5	327.6	338.5
Playbill	40.0	41.2	262.1	297.3
Stereo Review	75.6	41.5	412.7	232.2
Video	82.6	74.6	448.7	456.6
Video Review	—	—	—	—
Total Group	**389.3**	**364.9**	**2,240.7**	**2,175.4**
% change		**+6.6%**		**+3.0%**
— National Sunday magazines —				
Parade (52X)	59.4	52.5	327.9	319.9
Total Group	**59.4**	**52.5**	**327.9**	**319.9**
% change		**+13.1%**		**+2.5%**
— Outdoor & sport —				
Alaska	36.8	51.3	279.9	299.9
The American Handgunner (6X)	35.0	34.0	100.0	102.0
American Hunter	—	—	—	—
Backpacker (6X)	—	—	86.0	104.3
Bass Master (9X) A	—	—	353.8	359.1
Bicycling (9X)	93.5	106.5	460.7	520.2
Duck's Unlimited (6X)	—	—	80.0	59.7
Equus	—	—	—	—
Field & Stream	85.7	79.3	561.6	554.7
Fins & Feathers A	28.4	—	246.9	177.0
Fishing World	—	—	166.5	140.6

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net, except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 70)

(Continued from Page 69)

June

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
Florida Sportsman	99.2	83.5	756.8	691.6
Flying	41.3	48.8	211.5	272.2
Golf Digest	164.0	124.4	673.5	629.0
Golf Magazine	—	—	—	—
Gun Dog (6X)	—	—	—	—
Guns	40.0	24.0	183.0	130.0
Guns & Ammo	45.3	41.7	284.0	245.2
In-Fisherman (6X)	61.5	68.0	333.5	366.0
Muscle & Fitness	110.0	111.3	648.3	643.3
Outdoor Life	—	—	—	—
Outside	57.4	43.9	293.4	270.7
Petersen's Hunting	40.3	33.6	246.0	208.0
The Runner	30.8	35.2	184.0	218.2
Runner's World (13X)	34.3	43.5	194.8	225.4
Salt Water Sportsman	77.1	94.8	662.4	576.4
Shooting Times	—	—	—	—
Sierra	32.4	38.5	108.9	107.9
Skiing (7X)	—	—	146.2	175.2
Skin Diver	108.2	95.5	570.0	496.5
Shooting Times	32.5	56.2	220.7	204.3
Southern Outdoors	—	—	224.4	179.4
Sport Fishing	35.0	—	105.0	—
Sports Afield	71.2	78.4	460.0	532.5
Tennis	93.6	96.2	442.6	483.0
Waterski (8X)	59.0	56.0	321.0	309.0
Western Outdoors (10X)	29.0	31.3	301.7	288.2
Wildfowl (6X)	—	—	—	—
Windrider (7X)	31.3	36.0	90.6	106.0
Women's Sports & Fitness	18.3	25.3	122.3	99.6
World Tennis	40.3	51.0	294.8	51.0
Total Group	**1,665.7**	**1,634.2**	**13,411.7**	**9,895.1**
% change		**+0.87%**		**+5.6%**

— Photography —

American Photographer	36.2	43.2	218.5	242.5
Petersen's Photographic	32.9	29.2	152.6	165.8
Popular Photography	77.2	82.8	389.4	532.6
Total Group	**146.3**	**155.2**	**760.5**	**940.9**
% change		**-5.7%**		**-19.1%**

— Religious —

Christian Herald (11X)	21.2	24.7	168.1	183.4
Christian Life	25.2	23.8	131.9	154.7
Christianity Today (18X)	24.8	41.5	274.0	376.3
Inside (4X)	71.8	58.8	167.8	142.0
Moody Monthly (11X)	30.2	42.7	267.0	313.5
Today's Christian Woman (6X)	41.2	38.7	96.0	128.4
Total Group	**214.4**	**230.2**	**1,104.8**	**1,298.3**
% change		**-6.8%**		**-14.9%**

— Science/electronic/mechanic —

Discover	23.6	26.3	181.8	191.4
Family Computing	45.5	28.6	249.4	243.5
Home Mechanix	40.1	57.7	395.9	415.3
Info World (52X)	166.0	149.0	733.0	763.0
Omni	56.3	72.9	337.3	345.8
Personal Computing	131.6	155.4	686.3	881.6
Popular Mechanics	66.7	95.8	548.6	594.5
Popular Science	64.5	54.2	492.9	451.2
Science Digest	13.7	20.7	75.6	150.1
Science 86 (10X)	17.6	17.7	107.0	154.2
Scientific American	39.4	42.5	205.0	281.6
Spectrum	67.6	88.9	527.3	636.5
Total Group	**732.6**	**809.7**	**4,540.1**	**5,108.7**
% change		**-9.5%**		**-11.1%**

— Women/fashion/service —

Bride's Magazine (6X) A	302.4	252.5	1,096.8	965.0
Cosmopolitan A	220.1	217.3	1,228.1	1,174.6
Essence	62.6	54.7	483.7	489.9
Family Circle (17X) A	124.5	107.4	874.7	856.2
Family Magazine	—	—	—	—
Glamour	157.6	160.0	1,052.8	1,018.0
Good Housekeeping A	181.0	141.8	986.3	1,007.8
Harper's Bazaar	64.8	80.0	736.2	776.1
Health	35.7	39.9	245.6	235.4
Ladies' Home Journal	117.5	105.3	681.9	647.4
Mademoiselle	107.7	106.3	735.1	722.8
McCall's	88.0	94.9	554.1	550.8
Military Lifestyle (10X)	62.8	36.5	317.7	194.4
Modern Bride (6X)	239.8	241.9	945.1	911.4
Ms	34.1	37.3	238.4	296.5
New Woman	71.5	49.9	426.6	310.4
Parents A	88.5	82.0	531.7	532.7
Redbook	98.6	87.8	564.9	533.1
Self	93.2	91.2	568.9	577.6
Seventeen	102.1	116.0	630.1	698.9
Shape	75.5	65.9	427.8	361.2
Soap Opera Digest (26X)	16.8	32.2	115.1	174.7
Teen Magazine	50.3	46.3	288.5	282.3
True Story A	38.5	45.8	271.3	276.8
Vogue	159.1	161.7	1,410.5	1,459.7
W Magazine	62.0	65.0	601.4	600.3
Weight Watchers	33.3	32.2	202.5	166.6
The Workbasket (10X)	29.7	37.2	208.7	227.4
Working Mother	54.9	71.0	397.4	437.5
Total Group	**2,772.6**	**2,660.0**	**19,481.9**	**16,487.5**
% change		**+4.2%**		**+18.1%**

— Youth —

Boys' Life	15.4	12.8	95.4	93.8
Campus Life (10X)	22.3	38.6	207.5	249.9
Total Group	**37.7**	**51.4**	**302.9**	**343.7**
% change		**-26.6%**		**-11.8%**

May

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985

— Business —

Advantage	67.0	43.0	289.0	247.0
Arizona Bus. Gazette (52X)	29.4	28.5	160.8	140.2
Atlanta Bus. Chronicle (52X)	86.5	51.6	380.6	242.9
Austin Business Journal (52X)	47.3	49.3	236.7	263.3
Baltimore Business Journal	152.0	168.0	756.0	556.0
Barron's (52X)	198.4	174.8	949.7	953.2
Boston Bus. Journal (52X)	156.0	144.1	701.0	676.5
Business Atlanta	55.1	62.3	281.5	296.6
Business First of Buffalo	47.0	64.6	282.7	299.9
Business First of Columbus	92.8	78.9	400.4	359.9
Business Journal/Milwaukee	103.4	101.6	478.8	538.6
Business Journal/Sacramento	44.1	25.4	190.5	164.9
Business North Carolina	49.3	40.2	196.8	163.7
Business Week (52X) A	333.4	435.4	1,535.0	1,813.5
Business West	31.0	28.0	82.0	62.0
Cincinnati Business Courier	93.1	56.8	372.9	288.5
Corporate Report/Kansas City	27.7	42.9	155.1	242.3
Corporate Report/Minnesota	91.0	103.0	405.0	478.0
Crain's Chicago Bus. (52X)	185.0	174.0	797.3	742.0
Crain's Cleveland Bus. (52X)	54.9	88.8	287.5	383.5
Dallas/Ft. Worth Bus. (52X)	54.1	51.5	281.1	250.5
Dun's Business Month	50.1	45.0	225.2	247.2
Financial World (24X)	53.3	27.5	267.8	187.1
Florida Trend (13X)	69.1	68.9	440.2	489.5
Forbes (26X)	251.0	261.6	1,252.2	1,428.6
Fortune (26X)	225.3	230.5	1,045.5	1,328.4
Frequent Flyer	64.2	76.1	297.2	308.9
Futures (13X)	45.4	44.0	230.6	243.0
Georgia Trend	47.9	—	263.8	—
Grand Rapids Bus. Journal	41.7	17.7	159.7	68.2
Hawaii Business	54.3	53.2	222.0	227.0
High Technology	23.1	29.5	94.2	165.2
Houston Bus. Journal (52X)	69.0	86.0	423.5	597.8
Inc. Magazine A	126.1	118.6	431.1	504.6
Income Opportunities	56.5	47.1	260.9	221.8
Industry Week (25X) A	134.2	114.1	455.2	463.8
Indianapolis Bus. Journal (52X)	145.3	113.6	700.6	573.4
Kansas City Bus. Journal	116.7	144.4	588.9	675.9
Manhattan, inc	82.6	50.0	340.1	163.8
Nation's Business A	41.7	30.0	174.3	186.9
New England Bus. (20X) A	93.4	114.4	404.4	452.5
Pacific Bus. News (52X)	118.8	125.0	548.8	523.0
Philadelphia Bus. Journal (52X)	101.4	79.5	543.3	441.4
Pittsburgh Bus. Times (52X)	92.9	91.9	435.2	333.8
Regardie's	123.7	116.5	737.2	659.4
San Jose Bus. Journal	116.0	82.6	476.0	531.3
Savvy	32.2	32.8	146.3	176.1
South Florida Bus. Journal	87.8	77.9	517.0	405.2
St. Louis Bus. Journal (52X)	152.5	155.8	673.6	682.2
Texas Business	44.4	53.5	266.3	334.4
Venture	93.4	102.1	342.7	321.6
Total Group	**4,752.5**	**4,537.9**	**22,184.2**	**22,105.2**
% change		**+4.7%**		**+0.35%**

— National Sunday magazines —

Parade	45.7	52.1	268.5	267.4
USA Weekend (52X)	47.5	49.8	268.0	248.5
Total Group	**93.2**	**101.9**	**536.5**	**515.9**
% change		**-13.1%**		**+2.5%**

— Newspaper Sunday magazines* —

Boston Globe	202.0	204.9	1,015.8	937.2
Chicago Tribune	87.1	105.4	440.0	519.8
Cleveland Plain Dealer	51.3	51.8	238.2	217.5
Columbus Dispatch	41.7	51.8	207.5	223.8
Denver Post-Empire	164.0	192.0	708.0	764.0
Detroit News	76.0	77.0	400.0	358.0
L.A. Times Magazine	62.4	60.1	391.0	334.7
Miami Herald	62.7	33.1	242.4	199.7
New York Times Magazine	338.1	356.2	1,580.6	1,821.2
Philadelphia Inquirer	69.6	54.4	337.9	229.4
San Francisco Image	67.3	56.5	347.8	257.5
Seattle Times	53.0	46.0	251.0	207.0
Toledo Blade Magazine	38.4	54.7	197.8	185.5
Washington Post	129.3	133.6	644.4	563.1
Total Group	**1,462.9**	**1,477.5**	**7,002.4**	**6,818.4**
% change		**-0.98%**		**+2.6%**

— Weeklies/bi-weeklies —

The Advocate (26X)	129.0	87.9	728.6	467.0
Army Times Military Group				
Air Force Times (52X)	174.0	174.0	903.7	763.9
Army Times (52X)	168.9	169.5	808.9	742.7
Navy Times (52X)	189.6	173.6	870.3	816.1
The Blood-Horse (52X)	233.0	256.2	1,856.2	2,103.7
Capper's Weekly (26X)	23.0	19.5	149.9	132.3
Commonweal (22X)	6.8	8.6	43.3	38.1
Grit (52X) A	23.3	12.5	124.6	101.6
National Journal (50X)	69.3	67.3	296.7	272.0
National Review (25X)	30.2	33.6	151.7	116.6
New Republic (48X)	38.8	35.5	172.3	136.2
New York Magazine (50X)	288.0	274.8	1,185.7	1,155.0
New Yorker (52X)	209.7	268.1	986.3	1,221.0
Newsweek (52X) A	196.0	241.8	970.1	1,072.8
People (52X)	386.6	342.1	1,424.2	1,446.0
Rolling Stone (25X)	114.1	94.0	501.7	406.7
Sports Illustrated (52X) A	236.9	242.5	1,119.6	1,114.3
Time (52X) A	225.4	236.5	1,027.3	1,085.4
TV Guide (52X) A	367.5	319.9	1,617.9	1,633.9
TV Update (52X) C	2,601.0	2,066.0	12,219.0	11,071.0
U.S. News &				
World Report	132.4	144.6	621.6	695.1
Total Group	**5,725.5**	**5,268.5**	**33,048.1**	**26,591.4**
% change		**+8.6%**		**+24.2%**

— Foreign —

Business Week Int'l (52X)	153.5	143.5	604.6	585.2
Cosmopolitan Foreign				
Editions				
Australia	62.9	83.3	287.4	270.9
Brazil	54.7	50.0	253.0	168.0
France	157.2	149.2	297.3	528.1
Germany	152.0	128.8	522.5	483.9
Great Britain	121.0	143.0	469.5	515.8
Greece	70.0	50.3	205.0	329.4
Holland	99.0	95.0	300.0	303.3
Italy	102.0	78.3	367.8	276.9
Japan	41,3	46.3	254.7	160.6
Cosmopolitan en Espanol				
Central America	6.3	1.3	14.0	4.0
Colombia	17.0	24.7	38.0	49.0
Mexico	60.5	69.5	146.3	190.8
Peru	—	4.0	—	11.0
Puerto Rico	24.0	26.0	51.7	104.8
U.S. (Spanish language)	38.7	11.7	118.5	81.2
Venezuela	16.3	37.0	55.0	108.2
Good Housekeeping Foreign				
Editions				
Australia	30.9	28.0	131.6	148.7
Great Britain	164.6	140.4	605.0	547.8
Japan	79.0	69.5	309.7	323.1
Buenhogar				
Central America	2.0	2.0	4.0	5.0
Chile	2.0	1.0	6.0	6.0
Colombia	43.2	40.2	127.5	131.7
Mexico	41.0	30.8	129.3	158.0
Peru	11.0	10.0	24.0	34.5
Puerto Rico	9.0	14.0	40.5	39.0
Venezuela	24.0	39.7	102.7	123.7
Geomundo				
Central America	4.0	3.0	17.0	23.5
Chile	4.0	4.0	17.0	25.5
Colombia	8.0	11.5	35.3	40.0
Ecuador	3.0	3.0	13.0	18.0
Mexico	9.0	6.0	25.5	30.0
Peru	2.0	3.0	12.0	25.5
Puerto Rico	3.0	2.0	9.0	19.0
Venezuela	14.0	6.5	50.0	42.5
Hombre De Mundo				
Central America	12.0	3.0	31.0	17.0
Chile	14.0	4.0	30.0	20.0
Ecuador	9.0	3.5	24.0	19.5
Mexico	48.5	11.5	70.5	39.5
Peru	8.0	2.0	19.0	14.0
Puerto Rico	12.0	3.0	25.0	18.0
Venezuela	37.5	20.5	87.5	67.5
Ideas Para Su Hogar				
Colombia	19.5	20.5	44.2	58.5
Ecuador	2.0	5.0	8.0	19.0
Mexico	10.8	15.7	19.8	33.2
Peru	8.0	2.0	12.0	10.0
Puerto Rico	—	2.0	—	5.0
Venezuela	15.8	16.0	44.2	62.5
Mecanica Popular				
Argentina	2.7	1.3	13.3	15.0
Central America	9.5	7.5	44.3	49.8
Chile	3.0	1.3	23.3	17.8
Colombia	17.5	11.2	75.2	55.8
Mexico	10.0	15.7	43.7	57.0
Peru	10.5	8.5	46.8	59.2
Puerto Rico	7.0	8.0	33.8	52.5
Venezuela	11.0	11.3	47.6	58.0
Vanidades Continental				
Central America	20.3	6.5	63.5	29.5
Chile	3.3	3.3	17.7	13.7
Colombia	48.8	66.2	240.0	291.5
Ecuador	15.7	14.7	81.2	94.7
Mexico	68.3	52.7	279.5	306.0
Peru	6.3	8.7	39.7	57.0
Puerto Rico	36.2	31.8	151.0	175.3
U.S.	54.2	44.3	205.0	188.8
Venezuela	28.8	52.8	146.8	227.5
International				
Communications				
African Business	34.8	28.0	142.1	120.6
New African	19.8	11.4	92.8	73.6
The Middle East	8.1	21.4	45.5	90.3
International Management				
Europe	54.5	52.8	216.7	223.7
Middle East	10.5	15.0	46.3	85.2
Johnston International				
Alam Attijarat	41.1	48.2	171.9	230.5
Modern Africa (6X)	24.0	13.2	53.1	36.8
Modern Asia (11X)	32.3	42.0	149.3	145.3
Newsweek International A				
Atlantic (52X)	97.2	114.2	376.6	382.3
Latin America (52X)	35.5	32.2	140.4	114.0
Pacific (52X)	63.0	74.4	260.4	268.4
Progreso (9X)	15.5	11.0	27.2	35.6
Reader's Digest				
Arabic	2.5	6.5	21.0	45.0
Asian	199.0	251.0	1,067.3	902.0
Australian	69.5	58.5	292.9	261.6
Belgian-Flemish	85.3	142.0	324.6	395.5
Belgian-French	36.0	80.0	188.8	283.5
British	46.6	59.6	203.6	228.4
Chinese B	89.0	120.0	460.5	546.5
Danish	35.5	37.8	137.2	165.2
Dutch	38.5	39.8	159.6	214.1
Finnish	55.5	38.8	172.0	197.1
French	25.0	46.3	86.0	250.3
German	70.0	76.3	333.6	350.2
Iberian	2.5	2.5	4.5	31.0
Indian-English	87.0	119.5	452.0	505.0
Indian-Hindi	9.0	14.0	54.0	48.5
Italian	62.0	44.0	200.0	188.5
Korean	29.0	25.6	135.4	121.1
Latin American				
Argentina	14.5	10.0	55.0	85.0
Brazil	—	4.0	14.0	19.0
Central America	4.0	5.5	27.0	37.0
Chile	10.0	8.5	46.5	38.5
Colombia	26.0	23.0	71.0	113.0
Ecuador	4.0	6.5	27.0	36.0
Mexico	68.7	46.3	230.4	176.4
Peru	3.0	4.0	31.0	41.5
Puerto Rico	—	3.0	19.5	23.0
U.P.B.	6.0	4.5	27.0	33.5
U.S. Spanish	11.5	13.5	91.5	43.0
Venezuela	5.0	5.5	37.5	51.5
New Zealand	43.0	59.0	244.0	236.0
Norwegian	11.5	22.0	37.0	101.5
South African	79.5	122.5	334.5	439.0
Swedish	33.0	12.5	88.0	64.5
Swiss-French	25.3	27.0	111.3	125.0
Swiss-German	32.0	38.0	148.0	174.5
Time International				
Time-Asia	74.0	84.5	330.3	375.0
Time-Atlantic	109.8	111.6	458.4	451.0
Time-Canada	213.5	177.4	916.9	821.1
Time-Latin America	50.0	48.2	214.4	173.5
Time-South Pacific	101.1	105.2	372.5	499.8
Visao (52X)	110.6	111.6	665.4	556.7
Vision/Latin America (26X) A	34.3	24.0	114.0	104.1
Total Group	**4,633.8**	**4,714.8**	**18,339.7**	**18,639.6**
% change		**-1.7%**		**-1.6%**

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Monday, June 30, 1986

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections, Section 1.

Saatchi, Omnicom losses mount

An Advertising Age roundup

The newly created mega-agencies lost nearly $200 million in billings last week as RJR Nabisco and Warner-Lambert Co. joined the growing ranks of advertisers that strictly enforce conflict policies.

Saatchi & Saatchi/Ted Bates Worldwide and the three agencies combining to form the proposed Omnicom Group—BBDO International, Doyle Dane Bernbach and Needham Harper Worldwide—have now lost $550 million in accounts since their mergers in April and May *(see chart at right)*.

The moves from Saatchi, Bates and the Omnicom shops clearly indicate advertisers are reasserting authority over their agencies, serving notice they not only are unwilling to bend the rules as much as the agencies had hoped, but will not let old relationships deter them from sticking to their policies.

In last week's display of hard-ball tactics:

- W-L terminated its 30-year relationship with Bates in the U.S., assigning $68 million in drug and gum advertising to Young & Rubicam, New York, and J. Walter Thompson USA, New York. W-L said the decision on whether to remain with Bates overseas would be left up to

(Continued on Page 70)

Megamerger billings scorecard

Reaction to the "Big Bang" mergers that took place in April and May, combined with client consolidations and realignments, have taken a toll on the two newly created mega-agencies. The table below details how those agencies have fared and contrasts their performance with the leading unmerged agency -- Young & Rubicam -- during the same period. All dollar amounts in millions. Source: *Advertising Age*.

Account	Agency	billings
Saatchi & Saatchi/Bates	**Net loss — $255 million**	
Won		**$103 million**
Xerox	Bates	41
RJR Nabisco	DFS	32
Oil of Olay	S&S Worldwide	30
Lost		**$358 million**
Colgate	Bates	100
RJR Nabisco	Esty	96
Warner-Lambert	Bates	68
Michelob	Bates	38
Republic Airlines	DFS	25
P&G (Encaprin)	DFS	19
Almay	S&S Compton	10
Nivea	S&S Worldwide	2
General Foods (Maxim)	Bates	0
Mars (Shaba cat food)	S&S Worldwide	NA
Omnicom	**Net loss — $117 million**	
Won		**$ 88 million**
Apple	BBDO	50
Michelob	Needham	38
Lost		**$205 million**
Needham Harper L.A./Honda	Needham	100
RJR Nabisco	DDB	32
IBM	DDB	30
Stroh	BBDO	20
P&G	Needham	[illegible]
Honda Canada	Needham	[illegible]
Tri-Honda	Needham	6
Young & Rubicam	**Net gain — $254 million**	
Won		**$294 million**
Colgate		55
TWA		55
RJR		50
Eastman Kodak		47
Warner Lambert		30
British Gas		22
G. Heileman Brewing (Old Style)		15
Strida Department Stores (Italy)		10
Toys 'R' Us (London)		10
Lost		**$ 40 million**
P&G/Richardson-Vicks		40

Client splits force shops to pare staff

By BRIAN MORAN

New York—The sluggish national advertising market and a dramatic flurry of client defections—some attributable to megamerger fallout—are prompting units of the major agency networks to trim staff.

Doyle Dane Bernbach this week is expected to make the first in a series of layoffs that could affect up to 200 employes even before DDB's planned combination with BBDO International and Needham Harper Worldwide, to form Omnicom Group, is complete.

Details of the layoffs were being worked out late last week, a DDB spokesman said.

The cuts would come on the heels of the agency's loss of about $32 million in RJR Nabisco billings and the impending departure of $30 million in business from IBM Corp. (AA, June 23). DDB this year also resigned its Kool cigaret business from Brown & Williamson.

The DDB cuts also are an element in the anticipated elimination of redundant positions at DDB and Needham when the completed Omnicom deal creates a combined agency to be known as DDB Needham Worldwide.

Needham says it has made no merger-related cutbacks yet, though the agency has not replaced 16 employes laid off after losing the Xerox account to Ted Bates Advertising here. BBDO says it has made no layoffs.

DFS-Dorland Worldwide, a unit of No. 1 megashop Saatchi & Saatchi, has dismissed close to 100 employes this year. A DFS spokeswoman attributed the reductions to "cutbacks in advertising spending across the board and general economic softening." DFS joined the Saatchi empire earlier this year (AA, March 3).

Last week, merger account fallout saw Ted Bates, another Saatchi shop, lose $68 million in Warner-Lambert business on top of a $100 million Colgate-Palmolive account loss in May. Bates subsidiary William Esty Co. yielded $96 million in RJR Nabisco billings. When SSC&B, an Interpublic Group of Cos. agency, trimmed 40 employes earlier this year, ceo Larry Lamattina cited clients' cautious spending and "flat budgets."

U.S. ad spending so far this year has fallen short of forecasts due to "continued sluggishness in the economy and a much lower than expected inflation rate," according to McCann-Erickson's semi-annual outlook *(see story, Page 6)*.#

Last Minute News

HHCC snares Grand Prix award at Cannes

Cannes—A campaign by Hill, Holliday, Connors, Cosmopulos for John Hancock Financial Services, both Boston, won the Grand Prix here last week at the International Advertising Awards Film Festival, sources said at press time. Two 60-second spots, both directed by Joe Pytka, were entered. In the first, a man discusses financial responsibilities with his younger brother. In the second, a young man talks to his baby daughter about their future. Both spots were written by senior vp-copy supervisor Bill Heater and produced by Mary Ellen Argentieri and Jan Wieringa. Don Easdon was the art director *(see related story on Page 64)*.

Noxell to go national with Clarion

Baltimore—Noxell Corp. in September will introduce Clarion cosmetics nationally following test-marketing (AA, Dec. 9). Noxell will spend $10 million via SSC&B, New York, during November and December, and the budget is expected to hit $20 million in 1987.

Army ad meet draws crowd of agencies

Fort Sheridan, Ill.—The U.S. Army's fiscal 1987 ad budget should rise 16% to $110 million, Army officials said last week, sweetening the pot for

(Continued on Page 8)

'Cosby' smashes upfront records

By VERNE GAY

New York—"The Cosby Show" has broken all network series pricing records by commanding $350,000 to $400,000 for 30 seconds in the 1986-87 network upfront market, up more than 40% per spot over last season's rates.

"Cosby" now becomes the highest-price series ever, with a per-unit cost second only to the last two Super Bowls. Next season the show should deliver to NBC at least $1 million per episode more than last season, when its price almost tripled to $247,000 per :30.

The "Cosby" figures were only the cream of the good news last week at NBC, whose control of the network tv upfront market is even greater than last year.

The No. 1 rated network is expected to close $1.3 billion in upfront business, much of it by July 4, the traditional starting date for upfront deal-making. NBC's total upfront sales would be 30% higher than last year.

That would leave CBS and ABC slugging it out for the remaining $900 million to $1.1 billion expected to be spent upfront this year—or about 41% less than the two networks split last year.

Total upfront spending this year is expected to be $2.2 billion, according to ad agencies, down 12% from last year. However, ABC expects upfront to total $2.45 billion this year, down 4% from last year.

The situation could force ABC and CBS to cut back pricing, though both networks are still trying to tag onto the NBC juggernaut.

No network has ever lowered prime time cost-per-thousand prices from the previous year. But all three networks this year dropped prices about 10% for 1986-87 daytime upfront buys.

NBC, which went into the mar-

(Continued on Page 72)

The biggest story for U.S. media companies in 1985 carries some now-familiar themes: Mergers, acquisitions and divestitures.

Beginning on Page S-1, Advertising Age *profiles the Top 100 U.S. media companies, ranks them in order of their 1985 revenues and lists in detail their wide range of activities.*

NEWSPAPER

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